



HokieMart Approver Guide





HokieMart Approver Guide

Contents

Introduction	3
Roles in HokieMart	4
System Requirements	5
Navigation	6
Searching for a Requisition or PO	7
User profile/ Notification Preferences.....	8
Purchase Requisition Actions	10
Assigning the PR	10
Reviewing/Editing the PR	12
Returning to the Requisitioner	15
Rejecting a Requisition.....	16
Adding a Comment.....	17
Approval Workflow and History of the Requisition.....	19
Other Actions	21
General Contact Information	22
Helpful links/Websites.....	22

Introduction

HokieMart is an e-procurement system which allows Virginia Tech to provide an effective and efficient purchasing system for the university. HokieMart, allows Virginia Tech:

- To secure better pricing of commonly-used products
- To provide one-stop shopping
- To reduce time and effort in the purchasing process
- To select goods from online suppliers
- To produce cost savings through the use of HokieMart contract suppliers
- To improve business practices with the introduction of initial purchase approval
- To increase efficiency with the use of central invoicing and electronic receiving
- To produce, in conjunction with Banner, accurate and more timely financial information
- To increase the flow of purchase orders to eVA

Roles in HokieMart

Requestor – an individual who initiates the **electronic** purchase of goods and services by shopping and creating a “cart.” The **Requestor** has numerous sources to search for commodities and services and place the chosen items in a “shopping cart.” After placing these items in the “shopping cart” the Requestor will “check out.” After “check-out” is complete, a Purchase Requisition (PR) is created.

On Behalf-of-Requestor - an individual who initiates the **electronic** purchase of goods and services “on behalf of” the **Requestor** who is authorized to use HokieMart.

Approver – individual designated to **electronically** review/edit and approve purchase requisitions within the delegated purchasing authority. After verification, the Approver may either reject part/all of the PR or approve the PR. Approval of the PR creates a Purchase Order (PO) that is electronically delivered to the supplier.

Receiver – an individual who **electronically** receives goods and services. The **Receiver** verifies receipt of goods/services. All or part of the order may be received depending on delivery (backorders, damaged goods, etc.). After HokieMart interfaces with Banner, a Banner PO number is created by the system. Typically, a single user may also serve as both a **Requestor** and **Receiver**. HokieMart provides a central receipt of invoice process for the entire university. All invoices created in HokieMart are sent directly to the Controller’s Office. Departments continue to receive invoices for direct payments and university contract transactions.

HokieMart is open to the entire university; there should be virtually no paper processing. The responsibility of each user is described in one of three guides: **Requestor**, **Approver**, and **Receiver**.

Additional HokieMart material may be found on the Purchasing website:

<https://www.procurement.vt.edu/hokiemart.html>

System Requirements

Web Browsers

HokieMart is a web-based product and is used in conjunction with the Internet. Users may access HokieMart from either a PC or Mac.

The following browsers are currently supported by Jaggaer for use of HokieMart:

Platform	Browser Support
Windows	Internet Explorer (IE) – Only Version 11* Edge – latest version with Windows 10 Chrome – latest version – automatically updated by Google Firefox – latest version – automatically updated by Mozilla
Macintosh	Safari 4.0 and higher Firefox – latest version – automatically updated by Mozilla
iPad	Safari – embedded browser within the iPad

*Previous versions of Internet Explorer are no longer supported. Users will be redirected to a page displaying recommended browsers.

Please note: iPad is supported by Jaggaer, however, not all Supplier punch-out sites will support the use of this device. Additionally, although Safari is supported by Jaggaer, not all Supplier punch-out sites will support this browser.

Navigation

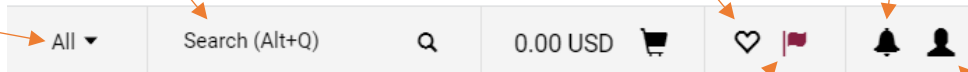
Top of the Home Page (right side) – Snapshot of the system and items that need to be processed

The **Quick Search** bar is for locating documents by number

The **Heart** icon is used to access **My Bookmarks**, useful for frequently used forms

The **Bell** icon will include the number of **Notifications** you have

Use drop down arrow to narrow search

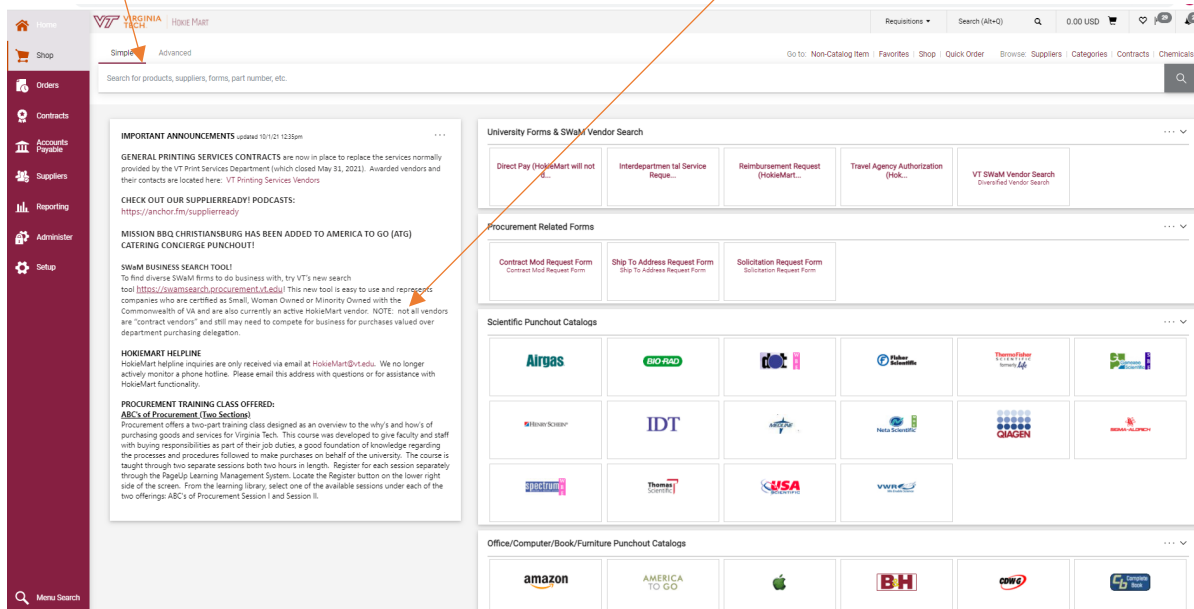


The **Flag** icon will include the number of **Action Items** you have to complete

The silhouette contains basic user information. Here you can **view your profile**

The **Search Tool** you can search for products, suppliers, forms and part numbers, etc

The **Organization Message** displays announcements from Procurement




The screenshot shows the HomeMart website interface. At the top, there is a navigation bar with the HomeMart logo, a search bar, and icons for currency (0.00 USD), bookmarks, flags, notifications, and user profile. Below the navigation bar, there is a sidebar with navigation links: Home, Shop, Orders, Contracts, Accounts Payable, Suppliers, Reporting, Administer, and Setup. The main content area is divided into several sections: 1. **IMPORTANT ANNOUNCEMENTS**: A notice about GENERAL PRINTING SERVICES CONTRACTS being replaced. 2. **CHECK OUT OUR SUPPLIERREADY! PODCASTS**: A link to a podcast. 3. **MISSION BOLD CHRISTIANSBURG HAS BEEN ADDED TO AMERICA TO GO (ATG) CATERING CONCERGE PUNCHOUT!**: A notice about a new catering option. 4. **SWAM BUSINESS SEARCH TOOL**: A notice about a new search tool for SWAM firms. 5. **HOMEMART HELPLINE**: A notice about a helpline for user assistance. 6. **PROCUREMENT TRAINING CLASS OFFERED: ABC's of Procurement (Two Sections)**: A notice about a training class. 7. **University Forms & SWaM Vendor Search**: A section with buttons for Direct Pay, Interdepartmental Service, Reimbursement Request, Travel Agency Authorization, and VT SWaM Vendor Search. 8. **Procurement Related Forms**: A section with buttons for Contract Modification, Ship To Address Request, and Solicitation Request. 9. **Scientific Punchout Catalogs**: A grid of logos for various scientific suppliers like Airgas, Biorad, IDT, Fisher Scientific, and others. 10. **Office/Computer/Book/Furniture Punchout Catalogs**: A grid of logos for various office and furniture suppliers like Amazon, America To Go, Apple, BH, and others.

Searching for a Requisition or PO

Approvers will have the ability to search for requisitions or POs using their unique numbers.

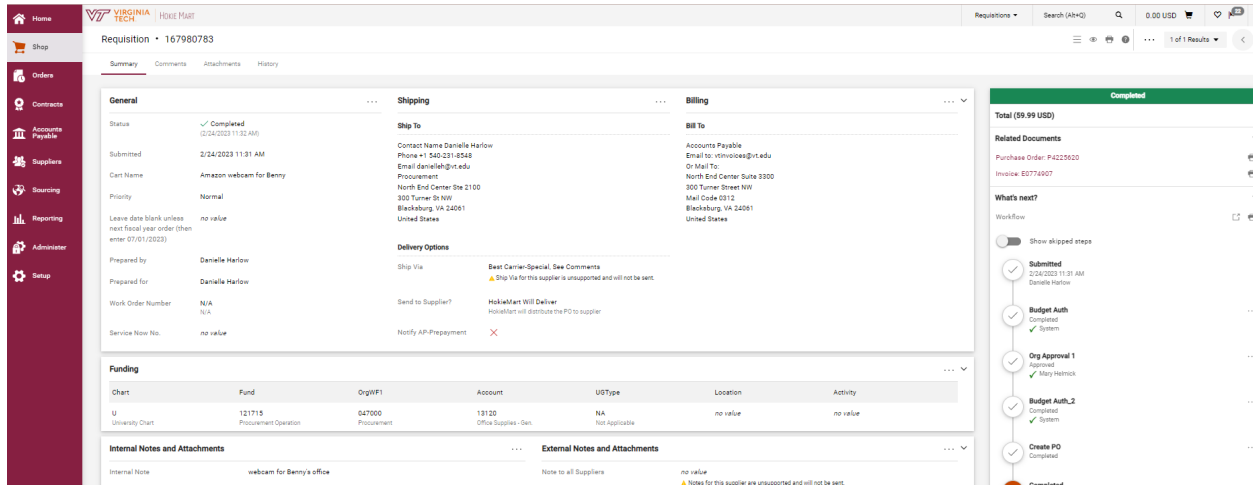
From the Home Page of HokieMart:

Enter the requisition number that you would like to view

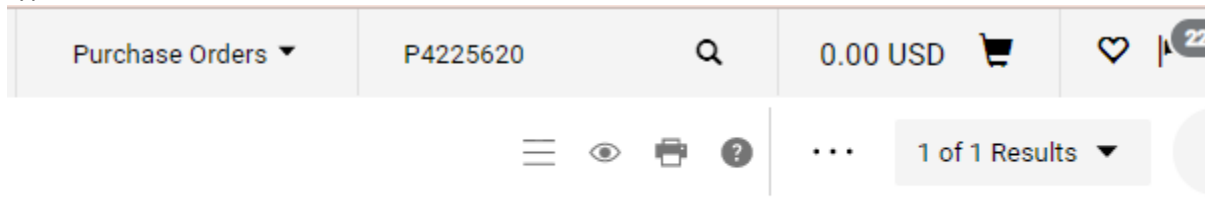
Select the  symbol



The entire requisition will be visible



Follow the same steps as above to view a PO. Change the drop-down options to Purchase Order then type in the desired PO number and search.




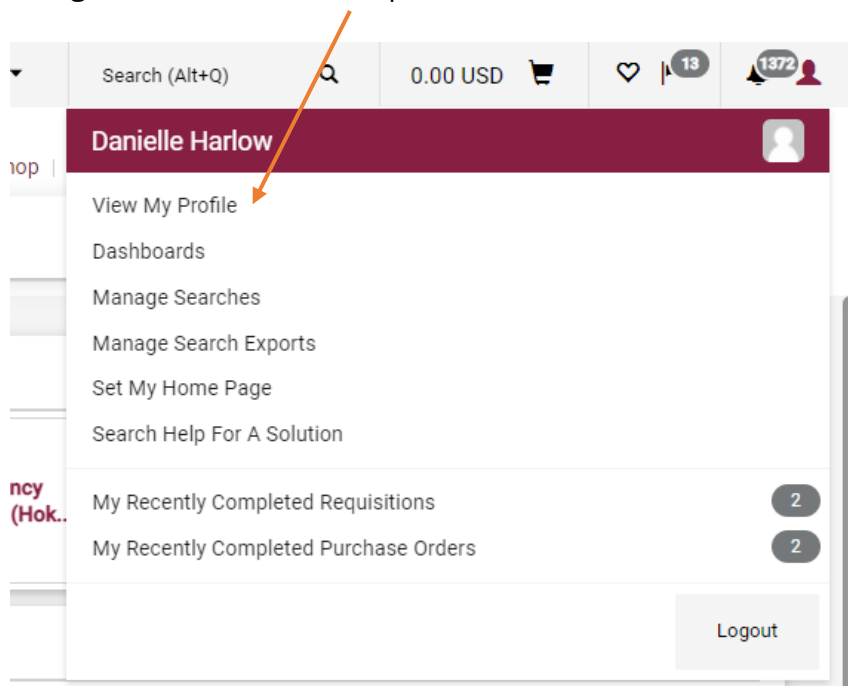
User Profile/ Notification Preferences

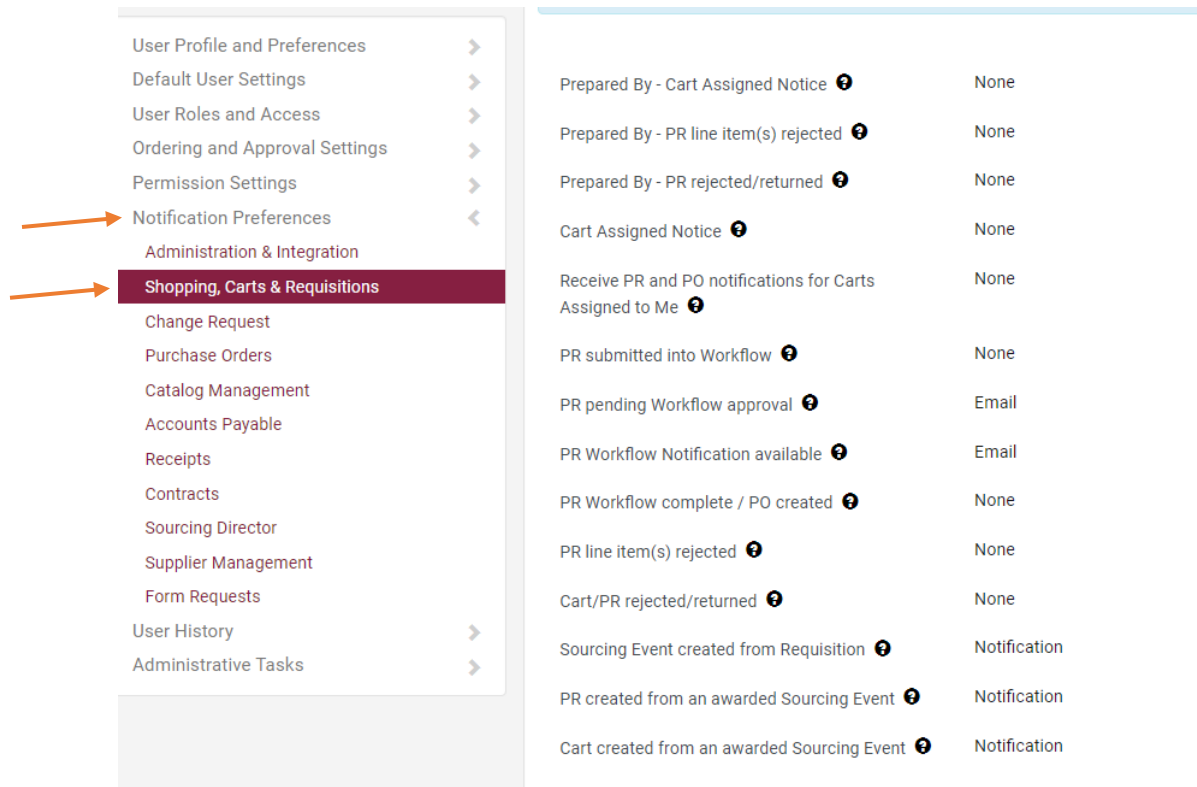
Each HokieMart Approver will have a “personalized” profile which must be created prior to performing HokieMart functions.

Email Preferences

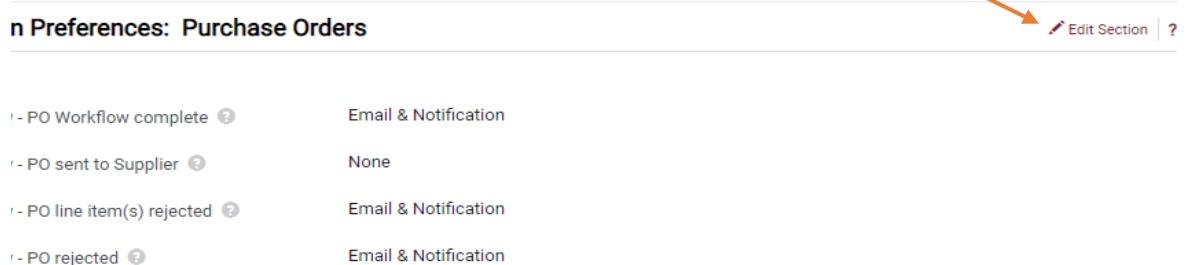
When a Purchase Requisition (PR) is generated in HokieMart, emails can be automatically generated to notify Approvers. By default, certain email notification boxes will be checked. Approvers may choose to check additional email notification boxes to increase the level of individual notification. By placing the cursor over the description, a brief definition will be displayed to assist users in making a decision.

- Select the silhouette icon 
- Then select “View My Profile”
- Navigate to the notification preferences section





The notification preferences are categorized by type. Select the type (ex. Shopping, Carts & Requisitions) and select the edit section.



In the edit section, select the type of notification you would like to modify from the drop-down (none, email, notification, or email & notification).

- **None (Default)** – no notifications are delivered by the system
- **Email** – the system will send an email to your VT email address
- **Notification** – will add a notification to the Notifications Menu on the top of the HokieMart page.
- **Email & Notification** – will do both listed above (recommended).

We recommend, at minimum, turning on the **PR pending Workflow Approval** email notification.

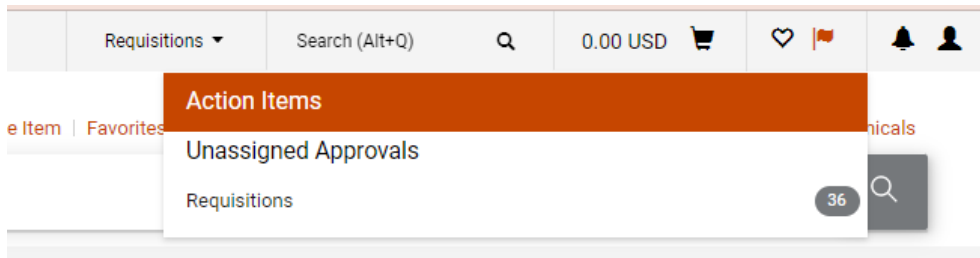
Purchase Requisition Actions

As an Approver, you have the responsibility to review/verify the data on the PR. The Approver or Substitute is responsible for ensuring that purchases are appropriate university expenditures.

As part of the review process, several actions may be taken:

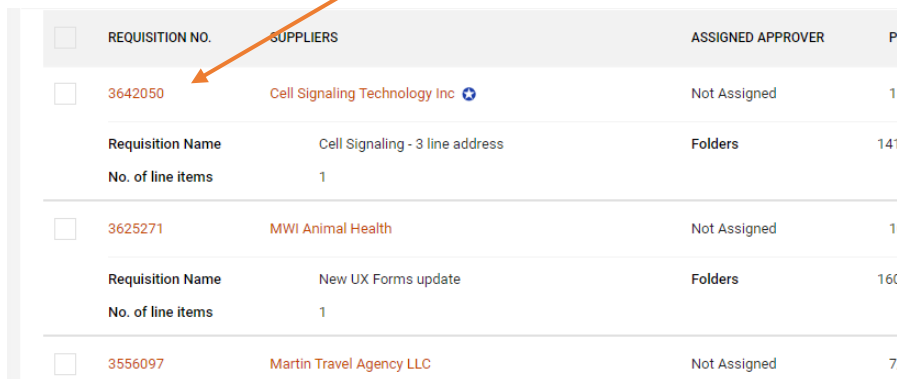
Assigning the PR

From the home page of HokieMart select the flag icon for action items.



A list of requisitions awaiting action will appear at the bottom.

Click on the requisition number.

A screenshot of a table listing requisitions. An orange arrow points to the first requisition number, 3642050. The table has columns for 'REQUISITION NO.', 'SUPPLIERS', 'ASSIGNED APPROVER', and 'PI'.

REQUISITION NO.	SUPPLIERS	ASSIGNED APPROVER	PI
<input type="checkbox"/> 3642050	Cell Signaling Technology Inc	Not Assigned	1
Requisition Name: Cell Signaling - 3 line address		Folders	141
No. of line items: 1			
<input type="checkbox"/> 3625271	MWI Animal Health	Not Assigned	11
Requisition Name: New UX Forms update		Folders	160
No. of line items: 1			
<input type="checkbox"/> 3556097	Martin Travel Agency LLC	Not Assigned	7,

Select "Assign to myself" on the requisition you wish to approve/reject.

Assign To Myself

Assign to myself

Approve

Withdraw Entire Requisition

Pending

SD)

The entire requisition summary will appear for your review.

Requisition • 3739429

Summary Comments Attachments History

General

Status: Pending (Op Approval 1 (Danielle Harlow))

Submitted: 3/24/2023 8:48 AM

Cart Name: 2023-03-24 danielle02

Priority: Normal

Leave date blank unless next fiscal year order (then enter 07/01/2009): no value

Prepared by: Danielle Harlow

Prepared for: Danielle Harlow

Work Order Number: N/A

Funding

Chart	Fund	Org/IF1	Account	USType	Location	Activity
U University Chart	121715 Procurement Operation	047000 Procurement	13120 Office Supplies - Gen.	NA Not Applicable	no value	no value

Internal Notes and Attachments

Internal Note: no value

Internal Attachments: Add

Completion Checklist

Is this a Sole Source? For Help Text, please click on this question. X

Buyer Checklist

Buyer Review PO Check: no value

Buyer Code: no value

Buyer Phone Number: no value

Buyer Fax Number: no value

After Hours Number: no value

Shipping

Ship To:

Contact Name: Accounts Payable

Phone +1 540-231-8348 Email to vtrinvoices@vt.edu

Email danielleh@vt.edu Or Mail To: North End Center Suite 3300

Procurement: 300 Turner Street NW

North End Center Mail Code 0312

Blacksburg, VA 24061 Blacksburg, VA 24061

United States United States

Delivery Options

Ship Via: Best Carrier-Special. See Comments

▲ Ship Via for this supplier is unsupported and will not be sent.

Send to Supplier? SoQuest Will Deliver

SoQuest will generate the PO to supplier

Notify AP-Prepayment: X

Invoice Attached (must be External Attachment): X

Billing

Bill To:

Accounts Payable

Email to vtrinvoices@vt.edu

Or Mail To: North End Center Suite 3300

300 Turner Street NW

Mail Code 0312

Blacksburg, VA 24061

United States

Pending

Total (43.37 USD)

What's next?

Workflow

Show skipped steps

Submitted: 3/24/2023 8:48 AM (Danielle Harlow)

Budget Auth: Complete ✓ System


Org Approval 1: Active (Danielle Harlow)

Budget Auth_2: Future

Create PO: Future

Finish: Future

Reviewing/Editing the PR

Throughout the requisition, to edit, select the pencil icon 





At this point the Approver must review and, if applicable, edit the PR. The PR cannot proceed through the approval process until the “Review” is done. The areas that can be edited are in the sections that follow.

General

In this section of the review, Approvers can update the following fields of General information:

Edit General ✕

General

Status	 Pending Org Approval 1 (Danielle Harlow)
Submitted	3/24/2023 8:48 AM
Cart Name *	<input type="text" value="2023-03-24 danielleh 02"/>
Priority	<input type="text" value="Normal"/> 
Leave date blank unless next fiscal year order (then enter 07/01/2009)	<input type="text" value="mm/dd/yyyy"/> 
Prepared by	Danielle Harlow
Prepared for	Danielle Harlow
Work Order Number *	<input type="text" value="N/A"/> 

★ Required fields

Cart Name: The system will automatically assign a name for the Cart unless users choose a unique name.

Priority: Approvers can modify the “priority” of the order. This should be left at “normal” unless the PO is above department delegation and a time-sensitive or urgent purchase.

Accounting Date: This field should be left blank unless you wish to use funds from a future fiscal year. If using funds from the next fiscal year, enter 07/01/ and the year.

Ship to Address

The "Ship To" is the location where materials will be delivered. The Requestor designates a "Ship To" address at the time the requisition is prepared.

As the approver you will need to review the information and ensure it's the proper location. To edit this section, click on the pencil icon in the Shipping block. Approvers can then edit the contact information, and shipping address, send to supplier method or indicate if a prepayment is required.

Edit Shipping ✕

Ship To ★

CURRENT ADDRESS ↻

Contact Name *	Danielle Harlow	<input type="checkbox"/> Add to my addresses
Phone	+1 540-231-8548	
Email *	danielleh@vt.edu	
Address Line 1	Procurement	
Address Line 2	North End Center	
City	Blacksburg	
State	VA	
Zip Code	24061	
Country	United States	

default - ., +1 540-231-8548, danielleh@vt.edu, Procurement, North End Center, Blacksburg, VA 24061, United States ★

Search additional 🔍 Results Per Page 10 ▼

Delivery Options



Ship Via	Best Carrier-Special, See Comments ▼
	<small>▲ Ship Via for this supplier is unsupported and will not be sent.</small>
Send to Supplier? *	SciQuest Will Deliver ↵
Notify AP-Prepayment	<input type="checkbox"/>

Bill To Adress

The "Bill To" address will be Accounts Payable in the Controller's Office. This address should not be edited.

Purchase Order Funding

As the approver you will need to review the funding information closely to ensure accurate fund, org, and account codes are being used.

Funding							 ... 
Chart	Fund	OrgWF1	Account	UGType	Location	Activity	
U University Chart	121715 Procurement Operation	047000 Procurement	13120 Office Supplies - Gen.	NA Not Applicable	<i>no value</i>	<i>no value</i>	

To edit the funding information, select the pencil icon 

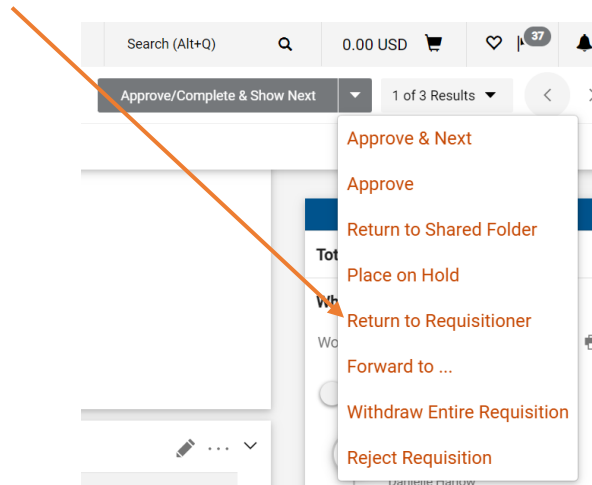
After the updates are made select "save" to apply changes.

A comprehensive list of university account codes may be viewed here:
<https://www.controller.vt.edu/accountcodes.html>

Returning to the Requisitioner

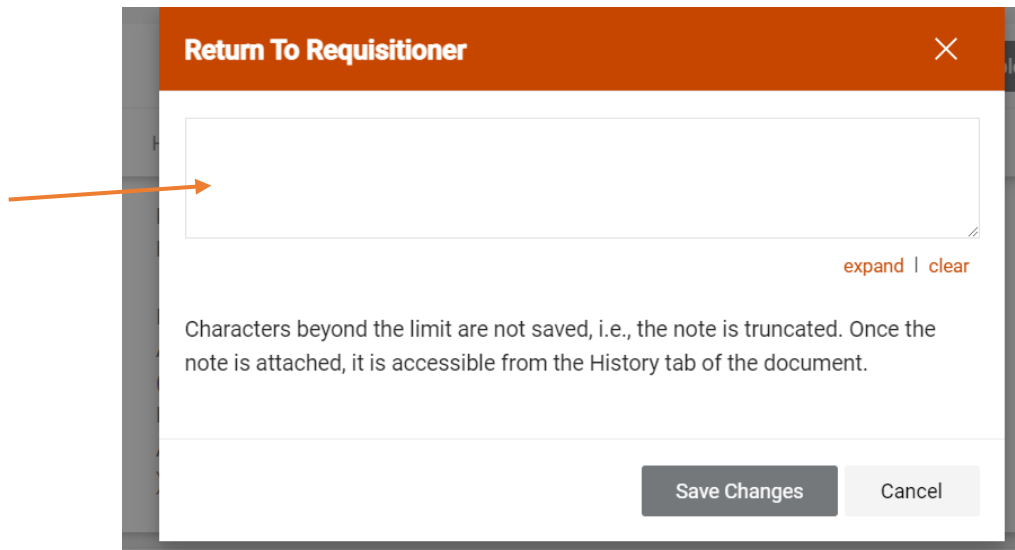
As an Approver there may be times that you will need to return the requisition back to the requisitioner to make changes.

From the drop-down action items select "Return to Requisitioner"



***Please note, the requisition must be assigned to the approver to have this action as an option.*

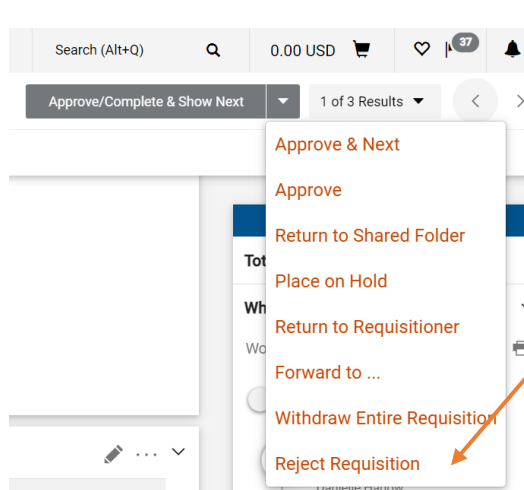
This will allow you to include a comment explaining why you are returning the requisition.



When done, select "Save Changes" to complete the action.

Rejecting a Requisition

Should you need to reject the requisition entirely, this action can be done, however, it will no longer be salvageable to the requisitioner, and it will remain permanently rejected.



A comment box will open which allows the Approver to add specific notes about the rejection. The note can be seen in the PO history.

Adding a Comment

Adding Comments to PR or PO

Approvers have the ability to add comments to the PR or PO. In addition, a comment may be sent to other HokieMart users. If designated, notification of a comment will be transmitted via email to the designated recipients. Examples of situations where a comment might be useful are:

- To notify a HokieMart user to submit a receipt
- To add an attachment
- To add a comment to a PR/PO after the PR/PO has been processed

To add a comment:

Select the **Comments tab**

Purchase Order • P3988571 Revision 0 ▾

Status Summary Revisions **1** Confirmations Shipments Change Requests Receipts Invoices **Comments** Attachments History

General Information		Document Status	
PO/Reference No.	P3988571	A/P status	Open
Revision No.	0	Workflow	✓ Completed (11/4/2021 3:28 PM)

The drop-down menu will allow user display comments from:

- All
 - Requisition
 - Purchase Order
 - Invoice
 - Receipt
-

We recommend leaving this set to All.

To add a new comment, select the "+" symbol

Type desired comment

Add recipient for the comment or select one of the recipients already listed

Include attachment to comment (optional)

Records found: 0

Show comments for All +

ADD COMMENT ✓ X

Please see attachment. - DH

973 characters remaining expand | clear

This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

Email notification(s) | Add recipient

Danielle Harlow (Prepared by, Prepared for) <danielleh@vt.edu>

Attach file (optional)

Attachment Type File Link/URL

File Name

File

Choose File Upload your file

No comments have been added

When satisfied with the comment select the check mark symbol



Records found: 1

Show comments for All +

Danielle Harlow - 12/6/2021 3:44:49 PM

Purchase Order - P3988571 Comment Added ↻

Please see attachment. - DH

Email sent: Danielle Harlow <danielleh@vt.edu>

The comment has now become a permanent part of the Purchase Order or Requisition.

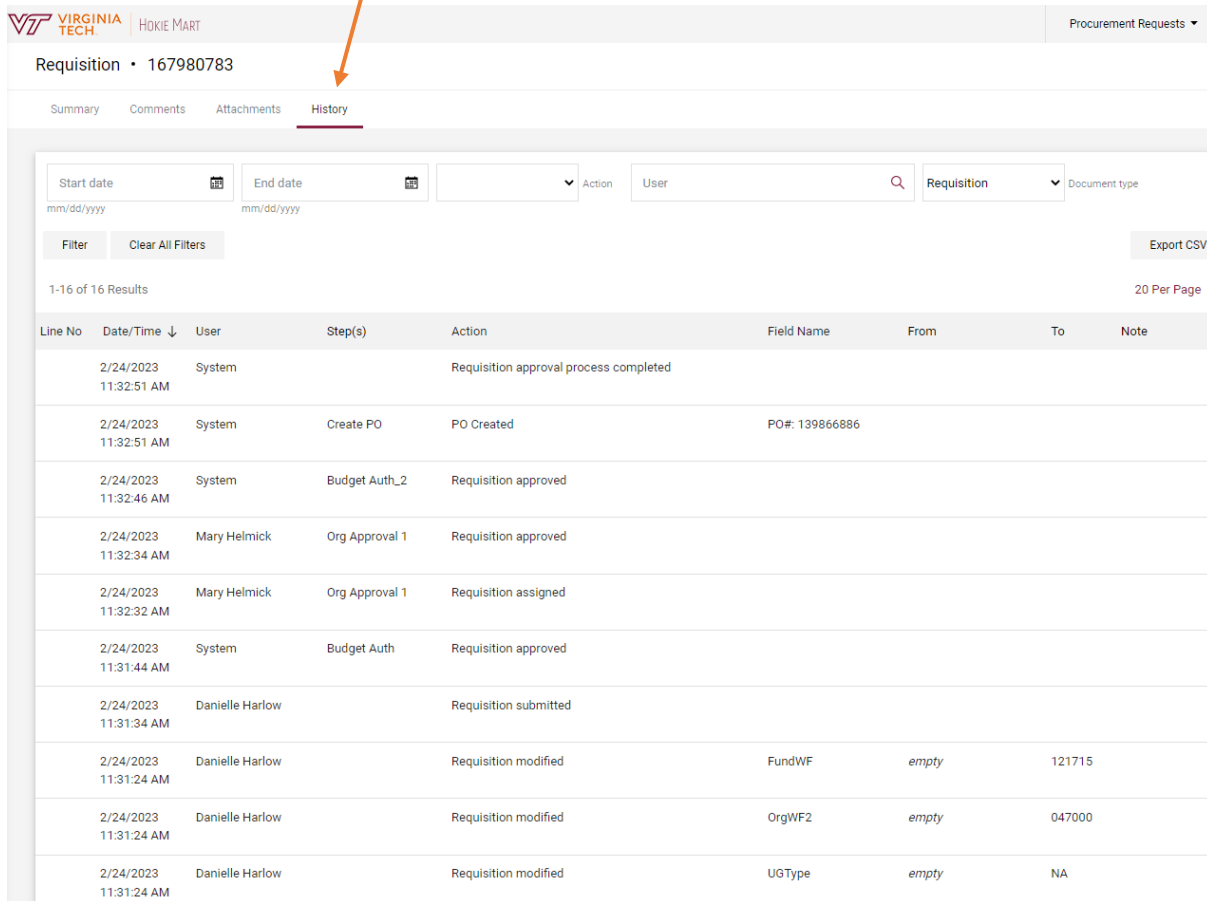
***Please note, comments cannot be deleted or edited once posted to the document. Anyone with access to view this purchase order in HokieMart can see the comments.*

Approval Workflow and History of the Requisition

History Tab

This tab provides the entire history of the requisition process from creation by the Requestor and the individual steps in the process.

An Approver can view the approval steps and any history pertaining to the requisition by selecting the "History" tab.



The screenshot shows the 'History' tab for Requisition 167980783. The interface includes a header with the Virginia Tech logo and 'HOKIE MART', and a breadcrumb trail 'Procurement Requests > Requisition • 167980783'. Below the breadcrumb are tabs for 'Summary', 'Comments', 'Attachments', and 'History'. The 'History' tab is active. The main content area features a filter section with 'Start date' and 'End date' (both set to 2/24/2023), an 'Action' dropdown, a search box for 'User', a 'Requisition' dropdown, and a 'Document type' dropdown. There are 'Filter' and 'Clear All Filters' buttons, and an 'Export CSV' button. Below the filter section, it shows '1-16 of 16 Results' and '20 Per Page'. The main data is presented in a table with the following columns: Line No, Date/Time, User, Step(s), Action, Field Name, From, To, and Note.

Line No	Date/Time ↓	User	Step(s)	Action	Field Name	From	To	Note
	2/24/2023 11:32:51 AM	System		Requisition approval process completed				
	2/24/2023 11:32:51 AM	System	Create PO	PO Created	PO#:	139866886		
	2/24/2023 11:32:46 AM	System	Budget Auth_2	Requisition approved				
	2/24/2023 11:32:34 AM	Mary Helmick	Org Approval 1	Requisition approved				
	2/24/2023 11:32:32 AM	Mary Helmick	Org Approval 1	Requisition assigned				
	2/24/2023 11:31:44 AM	System	Budget Auth	Requisition approved				
	2/24/2023 11:31:34 AM	Danielle Harlow		Requisition submitted				
	2/24/2023 11:31:24 AM	Danielle Harlow		Requisition modified	FundWF	empty	121715	
	2/24/2023 11:31:24 AM	Danielle Harlow		Requisition modified	OrgWF2	empty	047000	
	2/24/2023 11:31:24 AM	Danielle Harlow		Requisition modified	UGType	empty	NA	

Workflow

This section provides the workflow of the requisition and lists all of the approval stages before the requisition is completed and turned into a PO.

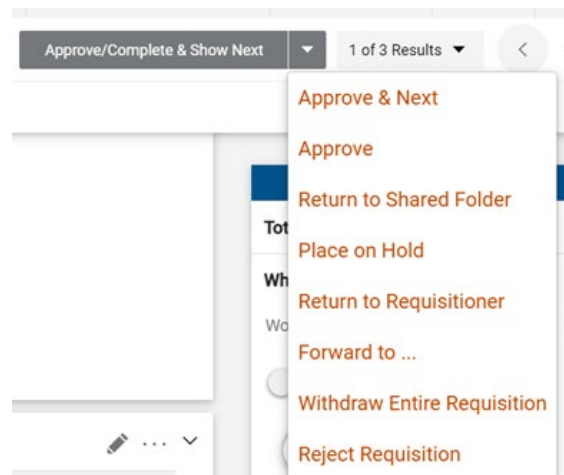
The screenshot displays a requisition workflow interface. At the top, a green header indicates the status is "Completed". Below this, the total amount is listed as "Total (59.99 USD)". A section titled "Related Documents" lists "Purchase Order: P4225620" and "Invoice: E0774907". The "What's next?" section shows a vertical timeline of workflow steps, each with a checkmark icon. A toggle switch for "Show skipped steps" is currently turned off. The steps are: Submitted (2/24/2023 11:31 AM, Danielle Harlow), Budget Auth (Completed, System), Org Approval 1 (Approved, Mary Helmick), Budget Auth_2 (Completed, System), Create PO (Completed), and Completed (2/24/2023 11:32 AM).

Step	Status	Completed By	Timestamp
Submitted	Completed	Danielle Harlow	2/24/2023 11:31 AM
Budget Auth	Completed	System	
Org Approval 1	Approved	Mary Helmick	
Budget Auth_2	Completed	System	
Create PO	Completed		
Completed	Completed		2/24/2023 11:32 AM

Other Actions

There are additional steps that may be taken from the drop-down menu.

If you have chosen "Assign" to place a requisition in your "Approvals" folder, you must take action on the requisition. You do, however, have the ability to take alternative actions.



Return to Shared Folder - places the requisition back into the organization folder. This will release you from the approver responsibility and allow another approver to assign the requisition.

Place on Hold - there may be times that you wish to delay action. By using this option, it will not require any action until you change the date.

Forward to - this will forward the requisition to another assigned Approver. If this option is selected, you will be able to choose another Approver to assume responsibility for approving the requisition.

General Contact Information

HokieMart	Questions concerning HokieMart functions (rejected/pending PRs and POs), appropriate form usage and procedures, vendor receipt of orders: HokieMart@vt.edu
Accounts Payable	Questions concerning the payment of invoices, encumbrances, and expenditures: Accounts Payable acctpay@vt.edu
Receiving	Questions concerning electronic receiving: Accounts Payable acctpay@vt.edu
Banner Reports	Questions concerning Banner Finance Reports: General Accounting genactg@vt.edu
HokieMart Access	Questions concerning updating or adding roles (Receiver, Requestor, Approver) or access to funding: General Accounting genactg@vt.edu

Helpful links/Websites

Additional HokieMart material and HokieMart User Quick Guides may be found on the Procurement website: <https://www.procurement.vt.edu/hokiemart.html>

Issues of the HokieMart Newsletter, The Cart, may be found at:

<https://www.procurement.vt.edu/hokiemart/cart.html>

***Please note if you are an active user in HokieMart, you will receive The Cart newsletter.*

Latest updates about upcoming HokieMart upgrades can be found at:

<https://www.procurement.vt.edu/hokiemart/updates.html>